

STUDY ON MARKETING POTENTIAL FOR CHANNELS INVOLVED IN MARKETING OF GLUTEN- FREE FOODS IN INDIA AND USA

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ABSTRACT

The prevalence of celiac disease is approximately 1%-5% worldwide. Gluten-free food is highly recommended for patients of celiac disease. Gluten-free foods are also consumed by patients of diabetes, blood pressure and health conscious people. Gluten-free products were sold through various channels in India and USA. The study aimed to explore the untapped potential of gluten-free products in India and USA. Study revealed that total world's potential of gluten-free foods was found about 13,000 KT. USA had potential of 511.89 KT and its market share was 205 KT. India had gluten-free market potential of 2,347 KT, but had a comparatively lower market share of 7.55 KT in 2017. The project included price spread, marketing efficiency, channel selection, market penetration and expansion strategies. Most successful channels in both the countries were online sale and manufacturer's own retail format. Studies of value chain provided an opportunity to international and domestic companies to come up with nutritive and affordable options.

KEYWORDS: *Gluten-free Food, Price Spread, Marketing Efficiency, Celiac Disease & Marketing Potential*

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INTRODUCTION

Celiac disease is a multi-system disorder, highly variable in its clinical expressions that may occur at any age, and may be present with variety of manifestations. The prevalence of celiac disease is approximately 1% in some areas of world. Few areas have high prevalence ranging from 2-5%. Patients of celiac disease shall follow a strict gluten-free diet. Gluten-free foods are also consumed by patients of diabetes, blood pressure, autism, lactose intolerance and health conscious people. Owing to this, the diagnosis is often delayed (Szajewska, Shamir, Mearin2016). The gluten-free products are mostly bought by patients of celiac disease (CD), wheat allergy, non-celiac gluten sensitivity, autism, multiple sclerosis, irritable bowel syndrome (IBS) and attention-deficit/hyperactivity disorder (ADHD). The market size for gluten-free products has grown to about 40 million consumers, including 4 million have celiac disease, 18 to 22 million have gluten sensitivity, 12 million consumers are gluten-intolerant and experience gastro-intestinal (GI) distress, but they have not given up gluten completely, and 3 million consumers purchase gluten-free products, as the latest food trend or non-medical reasons (The Gluten-Free Agency 2016).

The competition in gluten free products' market of USA has a mix bag of big organized brands as well as small vendors. The competition is based on price, taste, nutrition, and convenience. Holistic marketing approach is a key Mintel driver to promote gluten-free products. Facebook, Instagram, Twitter, Reddit etc. have created a platform for the companies to increase the awareness about benefits of gluten-free products, as it will help them to create and maintain customer base. Major players in the gluten free market in USA are-Dr. Schär, The Hain Celestial Group, Inc, Bob's Red Mill, Boulder Brands, Chobani, General Mills, Hero, Popcorn Indiana, Udi's and Glutino (Mintel Data 2014). Other vendors in the market include Amy's Kitchen, Kraft Heinz Company, Aleia's Gluten-free Foods, Kellogg, Nestlé PepsiCo and Enjoy Life Foods (Technavio's Market Research, USA, Gluten Free Market 2016).

Makharia's (2014) studies pursued to update and further investigate the spread of celiac disease throughout India. The companies offering gluten-free foods are facing problems in the Asian market, due to high price of products, lack of awareness about the products, un-diagnosed cases and inefficient value chain for gluten-free products. The important factor governing the issues is the sky touching prices of gluten free foods, as compared to the regular food products which is almost 200 times expensive (Mintel Data 2012). In a study by Missbach (2015), it was found that difference has shrunk. Study by Cristina (2016) infers that some celiac patients resist gluten-free foods due to perception of low nutritive value as compared to gluten containing foods, especially in the Asian region, where wheat is considered as one of the major source of fiber and protein. A few leading brands in India are Dr. Schar, Dr. Gluten, Gluten-free foods at Nature's Basket, Zero G, Beewell, Savorlife, Anmolpreet, Kalpana foods, Nagrain etc. Studies should be conducted for the better high nutrition gluten-free foods at comparatively affordable prices. Studies of value chain in both the nations will provide an opportunity to leading brands to come up with affordable options with high nutritive value products to achieve economies of scale, and to address the needs of masses with their quality products.

METHODOLOGY

Area of Study: India and USA were taken as study area. It was a cross cultural study

Sources of Data: The study objectives were achieved by using primary and secondary data.

Primary Data: Selection of distributors was done using judgmental sampling. Total number of distributors in India was eight, in USA, total of six were covered. Snowball sampling for selection of retailers was used. In India, twenty-four retailers and in USA eighteen retailers were covered.

Secondary Data: Online newspapers, articles, research journals, reviews & forums. Data from websites of Celiac Society of India, Celiac Society of America, National Celiac Society of USA, Markets and Markets Analysis 2015, Mintel Data and Nielsen database.

Objectives of Study

- To study market potential for gluten-free products in India and USA
- To identify different channels involved in marketing of gluten-free products
- To study marketing efficiency and price spread as per channel, assortment available

RESULTS AND DISCUSSIONS

To Study Market Potential for Gluten-Free Products in India and USA

Table 1 shows the market potential and existing market share. To calculate the market potential, average per day calories consumption for males was taken as 2500 calories and 2000 calories for females, according to WHO standards.

Table 1: Market Potential and Existing Market Share of Gluten-free Foods – 2017

	Market Share (KT)	Estimated Value (USD Mn)	Market Potential (KT)	Estimated Value (USD Mn)	Gap in Potential (KT)	Gap in Value (USD Mn)
World	430	4,515	13,000.17	13,6501.785	12,570.17	131,986.785
India	7.55	79.275	2,347.31	2,4646.755	2,339.76	2,4567.48
USA	205	2152.5	511.89	5,374.8	306.89	3,222.3

Source: Researcher's own compiled data

Conversion factor 1KT=USD 10.5 Mn from Markets and Markets Analysis 2015

$$\text{Market Potential per year} = \text{Number of patients} \times \text{average per day consumption of gluten-free foods in calories} \times 365$$

Calories were converted into grams of fat, protein and carbohydrate. According to The Institute of Medicine, USA and Indian Medical Association, the ideal percentage of carbohydrate should be 45-65 percent, proteins 10-35 percent and less than 30 percent fat in daily calories of diet. Dietary fat has 9 calories per gram. Protein and carbohydrates in a meal has 4 calories per gram. An estimate of 1 percent population of each region, including world's population was considered as user of gluten-free foods. It was estimated that only 10 -20 percent of celiac patients were been diagnosed. In some countries, diagnosis rate was only up to 5 percent. Approximately, 70-80 percent of all cases remain undiagnosed; in many cases, sufferers represented either ambiguous symptoms or no symptoms at all. High prices of gluten-free foods were a major challenge for retailers and manufacturers.

According to the existing market share, the world achieved only 3.31 percent market share out of total world potential of gluten-free foods in 2016. USA had the largest market of gluten-free foods and acquired market share up to 40.05 percent of its total potential. USA offered highest variety in all sections of gluten-free foods. However, due to lack of fiber, nutrition, and taste, in addition to high price, people in USA often demanded products made from ancient grains, legumes and nuts, which were good in taste and high in nutrition at affordable prices. Organic gluten-free foods and veganism had also been on-trend in the last few months. Huge disparity exists between market share and market potential of gluten-free foods in India. According to the experts and estimated market share, only 0.5-2 percent of the market had been captured. Major reasons were lack of diagnosis of gluten-free products, difference in taste preferences, low quality of local foods and products generally lacking in nutrition, fiber and taste. Product awareness was less in rural areas and small towns. In addition, many doctors had done lobbying to promote a few particular brands, which did not allow other brands, especially the global ones, to enter into the market.

To Identify Different Channels Involved in Marketing of Gluten-Free Products

Channel actors identified in markets of gluten free foods by International Association for Cereal Science and Technology (2010) involved doctors, manufacturers, wholesaler, distributor, importer, channel commission agent, warehouse, retailer, small shop keepers and transportation charges. Various retail formats taken into account were

supermarkets/hypermarkets, grocery stores/ local shops including local bakeries, online stores, Hospitals and medical stores, specialty stores, HORECA (Hotels and restaurants). 6 retailers were selected from each city.

Table 2: Distribution Channels Being Identified In India & USA for Sales and Distribution of Gluten-Free Foods

Channels	India	USA
I) Producer-Consumer (online)		
II) Producer-Consumer (manufacturer's retail outlet)		
III) Product-Online agent-Consumer		
IV) Producer-Retail Agent-Consumer		
V) Producer-Wholesaler-Consumer		
VI) Producer-Retailer-Consumer		
VII) Producer-Wholesaler-Retailer-Consumer		
VIII) Producer-Agent-Wholesaler-Retailer-Consumer		
IX) Producer-Importer-Consumer		
X) Producer-Importer-Retailer-Consumer		
XI) Producer-Importer-Wholesaler-Retailer-Consumer		
XII) Producer-HORECA/ Institutional Buyers-Consumer		
XIII) Producer-Retailer-HORECA/ Institutional Buyers –Consumer		
XIV) Producer-Wholesaler-HORECA/ Institutional Buyers –Consumer		
XV) Producer-Doctor-Consumer		
XVI) Producer-Doctor-Medical store-Consumer		
XVII) Producer-Health stores/Medical stores/Gyms/Health clubs-Consumer		
XVIII) Producer-Specialty stores/Medical-Consumers		
XIX) Producer-Supermarkets/Hypermarkets-Consumers		
XX) Producer-Celiac support group events/gluten-free food events-Consumers		
XXI) Producer-Agent/hospital/doctor-Celiac support group events/gluten-free food events-Consumers		

Source: Researcher's own compiled primary data

Table 2 represents distribution channels being identified in India & USA for sales and distribution of gluten-free foods. Out of 21 channels identified, gluten-free foods in India are sold through 18 channels and in USA, they are sold through 13 channels. India has more number of channels due to highly unorganized retail sector, including many middlemen and agents. In India, even doctors acted as middlemen to sell gluten-free products. Most successful channels in India are channel I, II, VI, IX, XVI and XIX. In India, mostly gluten-free products are sold through specialty stores, supermarkets and e-commerce (online). In USA, channels are less in number, because retail sector is highly organized and included fewer middle men. Producers and manufacturers supplied their products directly to retailers and consumers. Most successful channels in USA are channel I, II, IV, XVI, XVII, XIX and XX. In USA, gluten-free products are mainly sold either online or in supermarkets. Mom and pop stores have limited range of gluten-free stores. However, dedicated gluten-free bakeries also provided a good range of gluten-free foods.

To Study Marketing Efficiency and Price Spread as Per Channel, Assortment Available

Marketing Margin was calculated as per each channel actor and product assortment available. Acharya and Agarwal (2001) defined marketing efficiency using the formula below:

$$ME = MP \div (MC + MM)$$

- Total marketing costs (MC)
- Net marketing margin (MM)

- Prices received by the farmer/manufacturer (MP) - Manufacturer's profit were also included in the research, while calculating the final price received by manufacturer. Since profit percentage varied according to channel, the final price received the manufacturer also varied according to the channel.
- Prices paid by the consumer (RP) - In case of gluten-free foods, price paid by consumers for particular brand remained same (except occasional/ special discounts), however price received by manufacturer varied due to difference in profit margin in each channel strategy. Arithmetically, relationship among four variables, i.e. $a+b+c = d$ is that, any three of these could be used as measure for comparing the marketing efficiency. To calculate MC, MM, MP and RP, USD 10 for USA and INR 100 for India were used. There were number of channels for calculation of price spread and efficiency, so in India, INR 100 was taken as base, which is equivalent to price of 1kg of gluten-free flour. In USA, USD 10 was taken as base, since two family size packets (each of 340-350 grams) of gluten-free bread costs nearly USD 10.

**Table 3: Price Spread and Marketing Efficiency for
Different Channels of Gluten-Free Foods in India**

Channels Used by Local Bakery																				
CHANNEL NO.	I	II	III	IV	V	VI	VII	X	XI	XII	XIII	XIV	XVI	XVII	XVIII	XIX	XX	XXI		
Producer's Price	79	80	69	65	65	60				60	53				55		70	65		
Marketing Margin	0	0	10	15	15	20				20	27				25		10	15		
Marketing Cost	21	20	21	20	20	20				20	20				20		20	20		
Consumer Price	100	100	100	100	100	100				100	100				100		100	100		
Price Spread	21	20	31	35	35	40				40	47				45		30	35		
Marketing Efficiency (ME)	3.7	4.0	2.2	1.8	1.8	1.5				1.5	1.1				1.2		2.3	1.8		
Channels Used by Indian Brands																				
CHANNEL NO.	I	II	III	IV	V	VI	VII	X	XI	XII	XIII	XIV	XVI	XVII	XVIII	XIX	XX	XXI		
Producer's Price	79	80	69	64	64	59	46			59	49	54	49	54	54	57	69	64		
Marketing Margin	0	0	10	15	15	20	30			20	30	25	30	25	25	22	10	15		
Marketing Cost	21	20	21	21	22	23	24			21	21	21	21	21	21	21	21	21		
Consumer Price	100	100	100	100	100	100	100			100	100	100	100	100	100	100	100	100		
Price Spread	21	20	31	36	36	41	54			41	51	46	51	46	46	43	31	36		
Marketing Efficiency (ME)	3.76	4.00	2.23	1.78	1.73	1.37	0.85			1.44	0.96	1.17	0.96	1.17	1.17	1.33	2.23	1.78		
Channels Used by Imported Brands																				
CHANNEL NO.	I	II	III	IV	V	VI	VII	X	XI	XII	XIII	XIV	XVI	XVII	XVIII	XIX	XX	XXI		
Producer's Price								48	38											
Marketing Margin								30	40											
Marketing Cost								22	22											
Consumer Price								100	100											
Price Spread								52	62											
Marketing Efficiency (ME)								0.92	0.61											

Source: Researcher's own compiled primary data

(Colour intensity- Dark green-high ME, orange/yellow-medium ME, Red- Low ME)

Table 3 represents price spread and marketing efficiency of different channels in India.

Channels working in India were:

- I) Producer-Consumer (online)
- II) Producer-Consumer (manufacturer's retail outlet)
- III) Product-Online agent-Consumer
- IV) Producer-Retail Agent-Consumer
- V) Producer-Wholesaler-Consumer

- VI) Producer-Retailer-Consumer
- VII) Producer-Wholesaler-Retailer-Consumer
- X) Producer-Importer-Retailer-Consumer
- XI) Producer-Importer-Wholesaler-Retailer-Consumer
- XII) Producer-HORECA/ Institutional Buyers-Consumer
- XIII) Producer-Retailer-HORECA/ Institutional Buyers –Consumer
- XIV) Producer-Wholesaler-HORECA/ Institutional Buyers –Consumer
- XVI) Producer-Doctor-Medical store-Consumer
- XVII) Producer-Health stores/Medical stores/Gyms/Health clubs-Consumer
- XVIII) Producer- Specialty stores/Medical –Consumers
- XIX) Producer-Supermarkets/Hypermarkets-Consumers
- XX) Producer-Celiac support group events/gluten-free food events-Consumers
- XXI) Producer-Agent/hospital/doctor-Celiac support group events/gluten-free food events-Consumers

Small and medium-sized companies and suppliers were dominant in India. Most of the suppliers in India have installed their manufacturing units near Punjab and Delhi region. Imported products from Europe and US had good penetration in the gluten-free segment. In Indian market, most popular gluten-free foods are from bakery, snacks and confectionery segment. Staple food and other ready to eat food products were gaining traction in the market. In many cities, gluten-free products were finding their way through retail stores. Online retail (E-tail) in India had grown tremendously in the last 5 years. It was expected to reach USD 8 billion by 2015. Mumbai topped the chart in online shopping followed by Delhi and Kolkata. Performance of top online players was forcing many physical retailers to move to online space.

In India, most effective channels I and II included online retail (ME was 3.76) and producers own retail outlet (ME was 4). They had highest marketing efficiency amongst all other channels and least price spread of INR 21 and 20, respectively. Both of these channels were effective in metro cities, where consumers did online purchases and companies could open their own retail store. Sales of gluten-free product through online agent (Channel III) and celiac support groups (Channel XX) had marketing efficiency (ME) greater than 2, thus could be used as effective channels to sell new launched products. For local bakeries, channel I, II, III and XX were best, since they had marketing efficiency greater than 2. Apart from these channels, channel VI, V, VI and XII could also be used to increase the customer base, since these channels had marketing efficiency greater than 1.5. Conventional channels including retailer, wholesaler, doctor and medical stores were popular in medium and small sized cities. In our study, the conventional channels were channel V, VI, VII, XVI, XVII and XVIII. Among these channels, channel V and VI had marketing efficiency greater than 1.5 and were most popular in most of the cities of India. Thus, local bakeries and Indian companies should focus on channel V and VI as sustainable channels. In big cities like Delhi and Bengaluru channel XIX was very effective, since most of people preferred to shop from supermarkets to get all the necessary goods under one roof. Thus, supplying gluten-free foods to

supermarkets could increase sales of products. One of the successful example was higher sales of Zero G flour through Natures' Basket in Bengaluru. Marketing efficiency through this channel was about 1.33. HORECA segment in gluten-free foods has also picked up sales in last few years. HORECA segment performed well in metro cities, where population was more about young working class people, working women and students. In metros, people had high disposable income and could pay premium prices for good quality, tasty and multi-cuisine food. Increased awareness about health attracted many people to shift to gluten-free diet. Amongst channel XII, XIII and XIV, channel XII had highest marketing efficiency (1.44 for bakeries and 1.5 for Indian companies) for HORECA segment.

For importing companies, channel XI was best. Marketing efficiency through this channel was about 0.92. Companies could earn higher margin, if they set up a manufacturing plant in India. It would help them to penetrate into sub-urban areas for increased sales, to get raw material at affordable prices and reduce the cost of transportation. New companies both Indian and global could use channel XVI, XX and XXI for brand building. Reference from doctor and celiac support group could increase the faith of consumers in gluten-free products. Good word of mouth could help to build a positive image. Channel XI and XIII had least marketing efficiency, thus shall be avoided or used less.

**Table 4: Price Spread and Marketing Efficiency for
Different Channels of Gluten-Free in USA**

Channels Used by Local Bakery														
CHANNEL NO.	I	II	III	IV	VI	VII	X	XII	XIII	XVI	XVII	XVIII	XIX	XX
Producer's Price	8	8.2	6.4	7	5			5.1		4.6			5.1	7.2
Marketing Margin	0	0	1.5	1	3			3		3.5			3	1
Marketing Cost	2	1.8	2.1	2	2			1.9		1.9			1.9	1.8
Consumer's Price	10	10	10	10	10			10		10			10	10
Price Spread	2	1.8	3.6	3	5			4.9		5.4			4.9	2.8
Marketing Efficiency (ME)	4.00	4.56	1.78	2.33	1.00			1.04		0.85			1.04	2.57
Channels Used by Brands of USA														
CHANNEL NO.	I	II	III	IV	VI	VII	X	XII	XIII	XVI	XVII	XVIII	XIX	XX
Producer's Price	8	8.3	6.5	7.2	5.2	4.6		5.2	4.6	4.5	5.1	5.2	5.5	7.3
Marketing Margin	0	0	1.5	1	3	3.5		3	3.5	3.5	3	3	2.5	1
Marketing Cost	2	1.7	3.5	2.8	4.8	5.4		4.8	5.4	5.5	4.9	4.8	2	2.7
Consumer's Price	10	10	10	10	10	10		10	10	10	10	10	10	10
Price Spread	2.00	1.70	3.50	2.80	4.80	5.40		4.80	5.40	5.50	4.90	4.80	4.50	2.70
Marketing Efficiency (ME)	4.00	4.88	1.86	2.57	1.08	0.85		1.08	0.85	0.82	1.04	1.08	1.22	2.70
Channels Used by Imported Brands														
CHANNEL NO.	I	II	III	IV	VI	VII	X	XII	XIII	XVI	XVII	XVIII	XIX	XX
Producer's Price							4.3							
Marketing Margin							3.5							
Marketing Cost							2.2							
Consumer's Price							10							
Price Spread							5.7							
Marketing Efficiency (ME)							0.75							

Source: Researcher's own compiled primary data

(Colour intensity- Dark green-high ME, orange/yellow-medium ME, Red- Low ME)

Table 4 represents price spread and marketing efficiency of different channels in USA

Channels working in USA were:

- I) Producer-Consumer (online)
- II) Producer-Consumer (manufacturer's retail outlet)
- III) Product-Online agent-Consumer
- IV) Producer-Retail Agent-Consumer
- VI) Producer-Retailer-Consumer

- VII) Producer-Wholesaler-Retailer-Consumer
- X) Producer-Importer-Retailer-Consumer
- XII) Producer-HORECA/ Institutional Buyers-Consumer
- XIII) Producer-Retailer-HORECA/ Institutional Buyers –Consumer
- XVI) Producer-Doctor-Medical store-Consumer
- XVII) Producer-Health stores/Medical stores/Gyms/Health clubs-Consumer
- XVIII) Producer- Specialty stores/Medical -Consumers
- XIX) Producer-Supermarkets/Hypermarkets-Consumers
- XX) Producer-Celiac support group events/gluten-free food events-Consumers
- XXI) Producer-Agent/hospital/doctor-Celiac support group events/gluten-free food events-Consumers

According to Packaged Facts (2013), a consumer buying preferences were studied, 71 percent responded that they prefer buying from nearby grocery store/ supermarket, 9 percent from independent natural/health food store/medical store, 8 percent from mass merchandisers/ wholesalers, 7 percent from natural food chain (e.g. Whole Foods, Trader Joe's, Wegman's, Target), 5 percent from club store (i.e. Sam Club) and 0.1 percent from drug store. In USA food manufacturers were blending ancient grains, such as quinoa, sorghum, legumes and amaranth to increase product value. Gluten-free products have improved in taste, quality and nutrition. Consumers had more options for base ingredients and ready-to-eat packaged goods. Improved product labelling has enhanced trust and confidence in ready-to-eat foods. Internet had given a voice to a target groups and celiac support groups. Products from larger cities now had access with the internet to variety of gluten-free products.

For local bakeries, channel I and II were best channels. They have marketing efficiency of 4 and 4.88 respectively. In both of these channels all the profit remained with producer but inventory hold cost was increased. Channel IV and XX had marketing efficiency greater than 2, thus they could be also used for expansion at local level, since they had only agent, the rest of the profit still remained with producer. Channel XII and XIX, where bakery products were supplied to HORECA segment and supermarkets/hypermarkets or natural stores had low marketing efficiency of 1.04, but they were sustainable channels, attracting high number of consumers, thus bakers could earn on high volumes instead of high margins. For domestic companies channel I and II were best with marketing efficiency of 4 and 4.88 respectively. Reasons for steep rise in number of online grocers were best price, delivery on time, goods delivered at door-steps, goods return or cash return policy and multiple options available. Channel IV and XX could be used for promotion of new products, these channels had marketing efficiency more than 2. Channel VI, XVIII and XIX could be used to attract more number of consumers and increased popularity. These channels had marketing efficiency greater than 1.5. These 3 were most popular channels, where most of Americans made their purchases.

Channel XII was about HORECA segment, it had marketing efficiency of about 1.08 but still was very popular due to following reasons: increasing number of working & young people, urbanization, high disposable income & economic growth, high cultural diversification developing the market of multiple cuisines with changing consumer preferences, growth of tourism industry. For imported gluten-free products, only channel X was available with marketing

efficiency of 0.75. USA had strict food export laws and food quality standards, which reduced the marketing margin. However, higher volume sales could bring benefit to manufacturers of foreign brands. Thus in India and USA, most successful channels were I (online sale) and II (manufacturer's own retail format). Manufacturers have opportunity to earn maximum profit margins through these two channels.

CONCLUSIONS & RECOMMENDATION

Huge gap exists between market potential and market share of gluten-free foods in India and USA. The gluten free companies have achieved only 3.31 percent market share of total global potential due to lack of awareness, lower rate of diagnosis of celiac disease and other wheat allergies, lack of purchasing power in developing countries etc. The USA, as the largest market of gluten-free foods, has acquired market share up to 40.05 percent of its total potential. In India, only 0.5-2 percent market share (as per estimates) of the total market potential has been captured so far. The gluten free product companies in developed and developing countries are working on different channels strategies to reduce the gap between market share and market potential. In India, mostly gluten-free products are being sold through specialty stores, supermarkets and e-commerce (online). In USA, gluten-free products are being sold either in online or in supermarkets. The channels with maximum marketing efficiency in both countries are Producer-Consumer (online) and Producer-Consumer (manufacturer's retail outlet). Amongst all the channels of distribution, online channel and retailer's own format has highest marketing efficiency. Thus, companies shall strengthen bond with online stores like Flipkart, Amazon, Snap deal etc. and shall trap the market of India and USA through e-commerce. Attractive product, free advice from dietician, discount coupons shall be provided occasionally, to increase the sales of gluten-free foods. E-commerce would also help to reach consumer, where gluten-free stores are not available or products are less available.

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